



DSDLink Onboarding Guide – Internal

Signing Retail Accounts Up – Manual

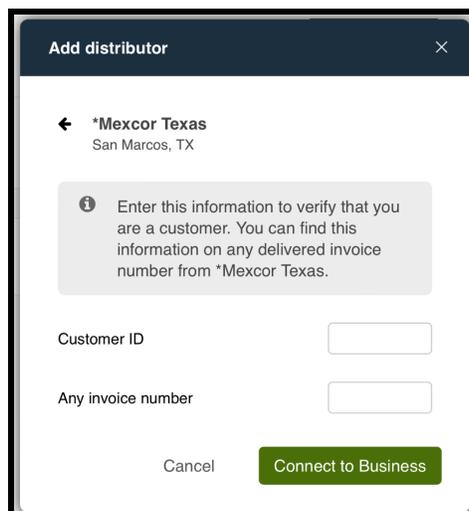
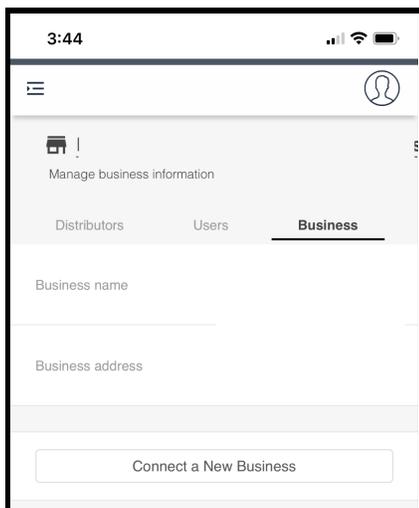
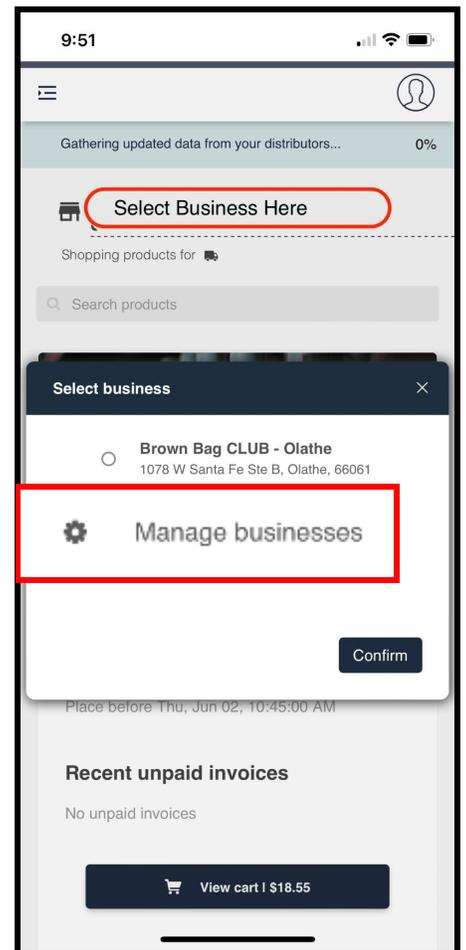
Create an account

1. Have the user download the DSDLink Mobile app or go to DSDLink.com and click sign up
2. Enter name, email, and phone number.
3. The user will receive an email from info@DSDlink.com
 - a. Corporate email accounts can take up to 10 mins to receive
 - b. The user did not receive an email? -> First check their spam folder then call/email DSDLink support (support@dsdlink.com)
4. Open the email up and click 'reset password'
5. Set password
 - a. APP: Close out the browser and reopen the app. Click sign in and use the credentials just created
 - b. WEBSITE: User is already logged in. They should be redirected to the home page where a white box in the upper left hand corner should pop up

Attach your business

6. Select Manage Businesses
7. Select Create a new business
8. Find your distributor
9. Enter a PAST Invoice Number and Customer ID

*Do this process for each business that a user can be connected to



Signing Retail Accounts Up – Invite from EM

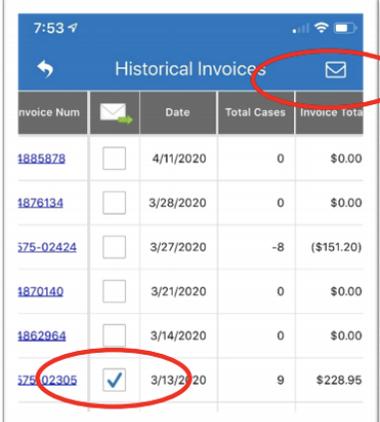
Send Historical Invoices (which is creating the customer account)

1. Open Encompass Mobile and click on the desired account
2. Click on historical invoices
3. Click envelope icon in top right corner
4. Type users email address

**Do you not have the user in the system? See below*

6. User will receive an email with historical invoice and a link to set their password on DSDLink

****No email address found? – Click + next to the email address, add customer user. This will be the email address they will use to sign in, receive email reminders and confirmations.**



Invoice Num	Date	Total Cases	Invoice Total
1885878	4/11/2020	0	\$0.00
1876134	3/28/2020	0	\$0.00
375-02424	3/27/2020	-8	(\$151.20)
1870140	3/21/2020	0	\$0.00
1862964	3/14/2020	0	\$0.00
375-02305	3/13/2020	9	\$228.95

Retailer – Finalizing Setup

1. Have the user check their email
2. Select 'sign up' link found in the Email
3. Set password
4. Download the DSDLink Mobile app
5. Sign in using their email address and password they just created
6. The user should be redirected to the home page and should be able to see their business name in the white popup box above 'manage business'.
7. Select their business

If the retail account has more than one business, they can use the manage page to add additional retail accounts.

Signing Retail Accounts Up – Invite from Encompass Server

Send Invite to DSDLink Email (which is creating the customer account)

1. Find the customer you are trying to sign up using customer search
2. Scroll to the users section and select 'Customer Users'
3. You should see invite to DSDLink for any users with an email address
**No customer users or no email for the user? See below*
4. Select Invite to DSDLink

Retailer – Finalizing Setup

8. Have the user check their email
9. Select 'sign up' link found in the Email
10. Set password
11. Download the DSDLink Mobile app
12. Sign in using their email address and password they just created

13. The user should be redirected to the home page and should be able to see their business name in the white popup box above 'manage business'.
14. Select their business

****No email address on user record?** - Click on the user's name, that will open the user record up. Click edit and add an email address. Click save and return back to step 4.

****No customer userst?** - Click add customers users. Begin typing the users full name into the users box and then click 'create new user'. Add the email address of the user and click add customers users. Return back to step 4.

FAQs & Troubleshooting Tips

The retail account forgot their password, where can they reset it?

- + They can reset your password on the login screen of the DSDLink app & server.

The retail account wants to change their email address?

- + They must resign up using the new email address and password. Then connect their business to the new account.

The app is unresponsive.

- + Hard close the app and then reach out to encompass support if the issue persists.

Retail account experiencing an issue with the app?

- + Are you experiencing the same issue in your DSDLink account or if you were to link to the customer?
- + Can they logout and then back in?
- + Can they hard close the app?
- + If using the app, Direct the user to the feedback page, found in the menu on the upper left corner, and fill out the necessary information. If no luck, call encompasses support after.

Incorrect Next Scheduled Delivery Date is shown?

- + Check the customers' stops. Next Scheduled delivery date is displayed based on delivery and driver-sell stops.

Incorrect Logo on DSDLink?

- + Find the brand in concern, go to the brands table → brand manager. Update the image as needed. The API will push the change to DSDLink every night.

Old products showing on DSDLink?

- + Check the product record in Encompass, is the status = active?

The invoice went to the incorrect delivery date:

- + *Is it past the cut off time? DSDLink cut-off is 1 hour ahead of the normal cut off*
- + *Did you recently change the stop or phase on the stop?*
- + *Invoice Audit → Subtable Invoice Transactions → Open Table → Subtable field audit → Open bottom record to read the error message*